**How to guide: Monitoring Information form**

**24 June 2023**

Arts Council England



## **Introduction**

As part of your application, you will be asked to provide monitoring information for your organisation. We will use this information to report to the government and to monitor the different backgrounds of people who receive grants. We will not use this information in creating assessment scores for your application.

This document contains the monitoring form questions alongside tips to help you to complete the form. We have provided it in Word format so that you can gather your monitoring information before starting your application on Grantium if you wish.

You may also find it helpful to watch the video walkthrough of the application form on Grantium. https://www.artscouncil.org.uk/our-open-funds/music-hub-investment/music-hub-investment-programme-making-your-application#t-in-page-nav-1

You should supply monitoring information for your organisation only or, if you’re applying on behalf of a consortium, for the lead applicant only.

Any questions marked with an asterisk (\*) must be answered otherwise you won’t be able to submit your form.

The monitoring form consists of three sections. Each section is not mutually exclusive; Section 1 should consist of the total number of senior management and board/council members; Sections 2 and 3 should tell us more about these senior management and board members.

## **Section 1: Senior management and board totals**

In Section 1, we ask you the total number of senior management within your organisation and the total number of members within your board or council.

|  |  |
| --- | --- |
| **\* Number of senior management:** |  |
| **\* Number of board/council members:** |  |

By senior management we mean the highest level of managers in your organisation, that sit within your management committee, immediately below your board or council.

By your board or council we mean the group that provides independent oversight, scrutiny, monitoring and strategic leadership for your organisation.

**Important:**

If a member of senior management also sits on your board/council, please only count them once.

## **Section 2: Leadership table**

In Section 2, we will ask you to complete the ‘Leadership table’ to provide monitoring detail on four specified leadership positions - Chief Executive, Artistic Director, Executive Director and Chairperson.

|  |  |
| --- | --- |
| **Chief Executive:** | |
| Equivalent position if different: |  |
| \* Identifies as Black, Asian, Ethnically Diverse? |  |
| \* Identifies as Disabled? |  |
| \* Identifies as LGBTQ+? |  |
| \* Identifies as Female? |  |
| \* Occupation of the highest income earner the household at age 14? |  |

|  |  |
| --- | --- |
| **Artistic Director:** | |
| Equivalent position if different: |  |
| \* Identifies as Black, Asian, Ethnically Diverse? |  |
| \* Identifies as Disabled? |  |
| \* Identifies as LGBTQ+? |  |
| \* Identifies as Female? |  |
| \* Occupation of the highest income earner the household at age 14? |  |

|  |  |
| --- | --- |
| **Executive Director:** | |
| Equivalent position if different: |  |
| \* Identifies as Black, Asian, Ethnically Diverse? |  |
| \* Identifies as Disabled? |  |
| \* Identifies as LGBTQ+? |  |
| \* Identifies as Female? |  |
| \* Occupation of the highest income earner the household at age 14? |  |

|  |  |
| --- | --- |
| **Chairperson:** | |
| Equivalent position if different: |  |
| \* Identifies as Black, Asian, Ethnically Diverse? |  |
| \* Identifies as Disabled? |  |
| \* Identifies as LGBTQ+? |  |
| \* Identifies as Female? |  |
| \* Occupation of the highest income earner the household at age 14? |  |

The first column in the table is optional, you can use this to tell us if your organisation has an equivalent position to any of the four leadership positions.

In the remaining columns you must select from the drop-down menu options for each of the categories:

* **Identifies as Black, Asian, Ethnically Diverse**
* **Identifies as Disabled**
* **Identifies as LGBTQ+**
* **Identifies as Female**

The drop-down options are **‘Yes’**, **‘No’**, **‘Prefer not to say’**, **‘Not known’** or **‘Post not applicable’**.

**‘Prefer not to say’** should be used where the individual was asked but chose not to disclose the information. **‘Not known’** should be used where the individual was not asked, or you are otherwise not able to provide this information.

For **Occupation of the highest income earner the household at age 14,** select from the following options:

* Modern Professional Occupations
* Clerical and Intermediate Occupations
* Senior Managers and Administrators
* Technical and Craft Occupations
* Semi-Routine Manual and Service Occupations
* Routine Manual and Service Occupations
* Middle or Junior Managers
* Traditional Professional Occupations
* Self-employed
* Short Term Unemployed
* Long Term Unemployed
* Retired
* Not applicable
* Don’t know
* Prefer not to say
* Other
* Post not applicable

**See examples** of how we define the occupations listed above. (https://www.artscouncil.org.uk/sites/default/files/download-file/Socioeconomic\_occupation\_definitions\_0.pdf)

## **Section 3: Monitoring tables**

In Section 3 we ask you to complete a series of tables to provide monitoring details for the senior management and board members that you totalled in Section 1.

**‘Prefer not to say’** should be used where the individual was asked but chose not to disclose the information. **‘Not known’** should be used where the individual was not asked, or you are otherwise not able to provide this information.

|  |  |
| --- | --- |
| **\* Ethnicity:** | |
|  | **Number:** |
| **White:** |  |
| British |  |
| Irish |  |
| Gypsy, Roma or Irish Traveller |  |
| Any other White background |  |
| **Mixed:** |  |
| White and Black Caribbean |  |
| White and Black African |  |
| White and Asian |  |
| Any other Mixed/Multiple ethnic background |  |
| **Asian/Asian British:** |  |
| Indian |  |
| Pakistani |  |
| Bangladeshi |  |
| Chinese |  |
| Any other Asian background |  |
| **Black/Black British**: |  |
| African |  |
| Caribbean |  |
| Any other Black background |  |
| **Other:** |  |
| Arab |  |
| Latin American |  |
| Any other ethnic background |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in this table (White, Mixed, Asian/Asian British, Black/Black British, Other) and their sub-categories must match the total number of senior management and board members that you entered in Section 1.

**For example, if you have six members of senior management and five board members you will be expected to input ethnicity details for 11 people in the ethnicity table.**

|  |  |
| --- | --- |
| **\*Sexual Orientation:** | |
|  | **Number:** |
| Bisexual |  |
| Gay Man |  |
| Gay Woman/Lesbian |  |
| Heterosexual/Straight |  |
| Queer |  |
| Number who identify in another way |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in the sexual orientation table must match the total number of senior management and board members entered in Section 1.

**\*Socio-economic Background**

Enter the total number of board/senior management members by the category of highest income earner of their household when they were 14.

**See examples** of how we define the occupations listed below. (https://www.artscouncil.org.uk/sites/default/files/download-file/Socioeconomic\_occupation\_definitions\_0.pdf)

|  |  |
| --- | --- |
|  | **Number:** |
| Modern Professional Occupations |  |
| Clerical and Intermediate Occupations |  |
| Senior Managers and Administrators |  |
| Technical and Craft Occupations |  |
| Semi-Routine Manual and Service Occupations |  |
| Routine Manual and Service Occupations |  |
| Middle or Junior Managers |  |
| Traditional Professional Occupations |  |
| Self-employed |  |
| Short Term Unemployed |  |
| Long Term Unemployed |  |
| Retired |  |
| Not applicable |  |
| Don't know |  |
| Prefer not to say |  |
| Other - please specify |  |

**Important:**

The total number input across all categories in the socio-economic background table must match the total number of senior management and board members entered in Section 1.

Click the 'Save' button below the table after you have answered this question.

|  |  |
| --- | --- |
| **\*Age:** | |
|  | Number: |
| 0-19 |  |
| 20-34 |  |
| 35-49 |  |
| 50-64 |  |
| 65-74 |  |
| 75+ |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in the age table must match the total number of senior management and board members entered in Section 1.

**\*Disability status:**

Enter the total number of board/ senior management members who are D/deaf and/or Disabled, or who have a long-term health condition.

|  |  |
| --- | --- |
|  | **Number:** |
| D/deaf and/or Disabled |  |
| Not D/deaf and/or Disabled |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in the disability status table must match the total number of senior management and board members entered in Section 1.

**\*Neurodivergent:**

Enter the total number of senior management and board that have declared they are neurodivergent.

|  |  |
| --- | --- |
|  | **Number:** |
| Neurodivergent |  |

**Important:**

You must input a number that is less than or equal to the total number of senior management and board members that you entered in Section 1.

Enter ‘0’ (zero) if you have no neurodivergent members within your senior management or board.

**\*Sex:**

|  |  |
| --- | --- |
| **Sex** | **Number:** |
| Female |  |
| Male |  |
| Intersex |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in this table must match the total number of senior management and board members entered in Section 1.

|  |  |
| --- | --- |
| **\*Gender identity** | |
|  | **Number:** |
| Woman |  |
| Man |  |
| Non-binary |  |
| Number who identify in another way |  |
| Not applicable |  |
| Prefer not to say |  |
| Not known |  |

**Important:**

The total number input across all categories in this table must match the total number of senior management and board members entered in Section 1.

|  |  |
| --- | --- |
| \*Sex registered at birth: | |
|  | **Number:** |
| Enter the total number whose gender identity is different to their sex as registered at birth |  |

**Important:**

You must input a number that is less than or equal to the total number of senior management and board members that you entered in Section 1.

Enter ‘0’ (zero) if you have no neurodivergent members within your senior management or board.r

Click ‘Save’ or ‘Save and Next’ when you have completed the monitoring.

Transcribed into Large Print by: A2i Transcription Services

Unit 4 Montpelier Central, Station Road, Bristol BS6 5EE

01179 44 00 44 info@a2i.co.uk www.a2i.co.uk

We welcome feedback so please get in touch!

Ref number: .37566